

Move Current to New File ID - FIN7200

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This utility is used to select individual funds or all funds in the current file ID and either move or copy them to a new file ID. The file ID can be a single character (alpha or numeric).

Move or copy a fund in a current file ID to a new file ID:

Field	Description
New File ID	Type a one character file ID, or click ⌄ to select the file ID to which you want to move or copy funds.
Move	Select to move the fund to the new file ID.
Copy	Selected by default, to copy the fund to the new file ID.

Scroll through the list of funds, and then select the **Select** field of the desired fund.

- To select multiple rows when the funds are consecutive, select a fund to start at, and then press and hold SHIFT while selecting a fund to end the selection process. All the rows (between the first and last row) in the sequence are now selected.
- To select multiple rows when the funds are not consecutive, select a fund, and then select other individual funds from different parts of the list.
- If you want to move or copy all funds, click **Select** in the column heading. All funds are selected. Select **Move** or **Copy** in the column heading to indicate the action for all of the selected funds.
- If you do not want to move or copy all funds, click the **Select** in the column heading to clear the **Select** fields of multiple funds so that the funds are no longer selected.

Other functions and features:

	Delete a row. Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved.


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